

UPS Shipping User Guide

March 2024

4800 Falls of Neuse Road, Suite 600 | Raleigh, NC 27609
p (800) 848-0143 | f (919) 755-8350 | www.softprocorp.com

Copyright and Licensing Information

Copyright © 1987–2024 by SoftPro, Raleigh, North Carolina.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road, Raleigh, NC 27609, or contact your authorized dealer.

Microsoft, Windows, and MS–DOS are registered trademarks of Microsoft Corporation in the United States and/or other countries. WordPerfect is a registered trademark of Corel Corporation. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, L.P. GreatDocs is a registered trademark of Harland Financial Solutions Incorporated. RealEC Technologies, Inc. is majority owned by Lender Processing Services. All other brand and product names are trademarks or registered trademarks of their respective companies.

IMPORTANT NOTICE – READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

Table of Contents

Contents

History	4
Introduction	4
Accessing the Vendor Services.....	5
License Agreement.....	6
Shipper Information.....	7
Account Information Screen	8
Shipping Screen.....	8
Create Shipment	9
Additional Options	9
Create Return Label	10
Shipment Details Screen	10
Adding Additional UPS Accounts	12

History

Date	Version	Details
March, 2024	1.0	Updated

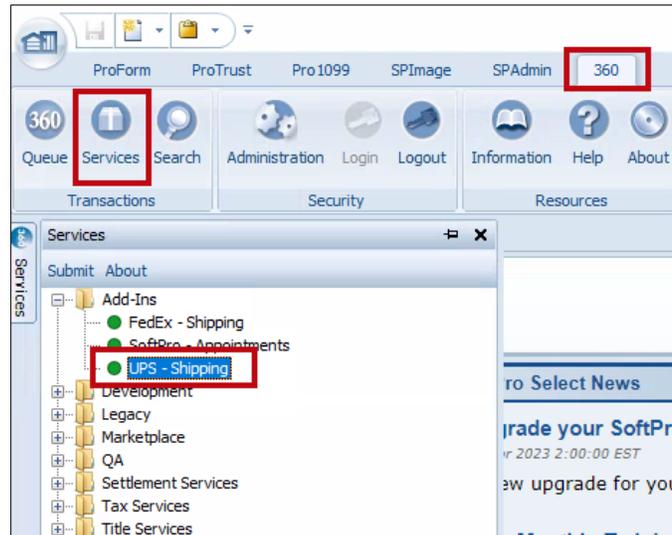
Introduction

In order to maintain a streamlined closing process, save time, and be more efficient, SoftPro 360 users have the ability to prepare UPS shipments directly from ProForm. SoftPro Shipping Services seamlessly populates the name, address, and phone number of the contacts in your ProForm order. This allows for the quick selection of a contact and create a UPS Shipping Label without ever leaving ProForm.

Accessing the Vendor Services

From the **360** ribbon:

1. Click the **Services** button
2. Double-click the **Add-Ins** folder to expand
3. Double-click **UPS - Shipping**



4. From the **Order Linking** window,
 - If no order is open, enter the corresponding order in the **Selected Order Number** field

- If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**

NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

- If multiple orders are open, all order numbers appear in the **Open Order Numbers** field and the first order is displayed in the **Selected Order Number** field. Highlight an order in the **Open Order Numbers** field to select the applicable order

- Press the **OK** button to continue

License Agreement

The first time you access **UPS Shipping** you will be taken to the **UPS Shipping – License Agreement** screen. To advance beyond this screen you must agree to the terms of the UPS Technology Agreement. The check boxes become enabled after you have read the agreement and move the right scroll bar to the bottom of the agreement.

- Using the scroll bar (to the right) scroll to bottom of the agreement
- Once enabled, select the **Yes, I do** radio button
- Click the **Next** button to continue

Shipper Information

After agreeing to the terms of the UPS License Agreement you will advance to the **UPS Shipping – Shipper Information** screen. Your contact information will be pre-populated based upon your SoftPro 360 registration.

On this screen you have the option to set defaults for **Delivery Confirmation, Address Validation, Ship Notification, Exception Notification** and **Delivery Notification**. Enabling these settings here will set them as the default for all users and for all labels created, however, you can modify the setting on a per label basis as needed.

- **Delivery Confirmation** options are None, Signature Required, Adult Signature Required and Shipper Release
- **Address Validation:** Address Validation is an automatic function that verifies the city, state, and postal code combination of any U.S. Ship To address. If UPS is unable to validate the combination, you will have the option to use a suggested address from an address database, revise the original address, or use the original address.
- **Ship Notification:** A Ship notification tells you when shipment information has been received by UPS
- **Exception Notification:** An Exception notification informs you about the unforeseen events resulting in a change to the expected delivery day and includes the rescheduled delivery date.
- **Delivery Notification:** A Delivery notification tells you when the shipment has been delivered

The screenshot shows the 'UPS Shipping - Shipper Information' window. The form is pre-filled with the following information:

- Name: Ashley Watts
- Company Name: 360 Test Organization
- Address 1: 4800 Falls of Neuse Rd
- Address 2: (empty)
- City/State/Zip: Raleigh, NC 27609
- Email: awatts@softprocorp.com
- Phone: (919) 829-1122

The 'Default Shipment Settings' section is highlighted with a red box and includes:

- Delivery Confirmation: None (dropdown menu)
- Address Validation: Validate Addresses
- Quantum View Notify®: Ship Notification, Exception Notification, Delivery Notification

At the bottom of the window, there are 'Back', 'Next', and 'Cancel' buttons. A small footer contains legal text: 'UPS, the UPS shield trademark, the UPS Ready Mark, the UPS Developer Kit Mark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.'

NOTE: You can get back to this screen by clicking the **Settings** button on the **UPS Shipping** screen.

Click **Next** to Continue.

Account Information Screen

On the **UPS Shipping – Account Information** screen you will need to enter your UPS Account Number, choose an Account Name, and enter the zip code associated with the account. If you do not currently have a UPS account click the **Visit UPS.com** link to open a new account.

If you have negotiated rates with UPS you will need to complete the Invoice Details section.

Click **Submit** to validate your UPS account number.

UPS Shipping - Account Information

UPS Account Number: 123475 [Visit UPS.com to open a new UPS account](#)

Select a Name For This Account: testing

Postal Code (Pickup Location): 27609-_____

Invoice Details

Authenticate your individual account using information from any of your last three delivery service invoices. This information is necessary in order to use UPS negotiated rates. If you do not receive regular invoices these fields can be left empty.

Invoice Number: _____

Charges This Period: _____

Invoice Date: March 1 2012

Control ID: _____ (Required only if present on invoice)

Back Submit Cancel

UPS, the UPS shield trademark, the UPS Ready Mark, the UPS Developer Kit Mark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.

NOTE: You can add additional **UPS Accounts** by accessing the **Manage UPS Accounts** button found on the **UPS Shipping** screen.

Shipping Screen

For subsequent uses of UPS Shipping, the **UPS Shipping** screen will be the first screen displayed. The **UPS Shipping** screen will display all shipments created for the linked ProForm order.

Click the,

- **Add Shipment** button to create a shipping label
- **Managing UPS Accounts** button to add additional UPS accounts, view current account or renew UPS registration

Refer to [Adding UPS Accounts](#) for additional information.

- **Settings** button to modify Shipper Information or change default settings

UPS Shipping - Shipments for Order 2012030005

UPS Tracking Number	Status	Created	Details
Click "Add Shipment" to create a shipment.			

Add Shipment Open Shipment Manage UPS Accounts

Settings Close

UPS, the UPS shield trademark, the UPS Ready Mark, the UPS Developer Kit Mark and the color brown are trademarks of United Parcel Service of America, Inc. All rights reserved.

Create Shipment

The **Create Shipment** screen lists the contacts entered into the linked ProForm order.

Highlight the contact you would like to ship to and (when entered into the ProForm order) the contact's name, address and phone number populate the appropriate fields.

If additional UPS Accounts have been added, they will be available in the **UPS Account** drop down list.

You have the option to select the **Package Type**, enter the package **Weight** and select the **Service Type**. You can also select the options of **Residential Delivery**, **Validate Address** or create a **Return Label**. The **Compare Rates** link will provide estimated rates for the package type selected.

Additional Options

The **More Options** link provides additional options that can be selected on a per shipment basis.

- **Additional Service Options** – Saturday Delivery
- **Delivery Confirmation** options are None, Signature Required, Adult Signature Required and Shipper Release
- **Verbal Confirmation:** To confirm delivery of your shipment, a UPS representative will call on the day of delivery, using the preferred contact telephone number listed on your UPS Next Day Air® Early A.M.® package.
- **Package Dimensions:** Length, Width, Height
- **Large/Unusual Shape Package** – Large Package and Additional Handling
- **Ship Notification:** A Ship notification tells you when shipment information has been received by UPS (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- **Exception Notification:** An Exception notification informs you about the unforeseen events resulting in a change to the expected delivery day and includes the rescheduled delivery date. (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- **Delivery Notification:** A Delivery notification tells you when the shipment has been delivered. (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)

- **Declared Value**
- **Account Type** options are: Daily Pickup (set by default), Customer Counter, One Time Pickup, On Call Air, Letter Center and Air Service Center

****NOTE: Value-added service charges may apply****

Create Return Label

To create a Return Label,

- highlight the Contact the package will be shipped from
- check the **Return Label** check box; this changes the **Ship To** field to **Ship From**
- Click **Submit**

Shipment Details Screen

On the **Shipment Details** screen you can preview, print or cancel your UPS shipping label.

To track the shipment, click the **Track** link, which will take you to the UPS tracking website.

Click **Close** to close this window to return to the **UPS Shipping** screen.

The **UPS Shipping** screen now displays a tracking number hyperlink for the shipment.

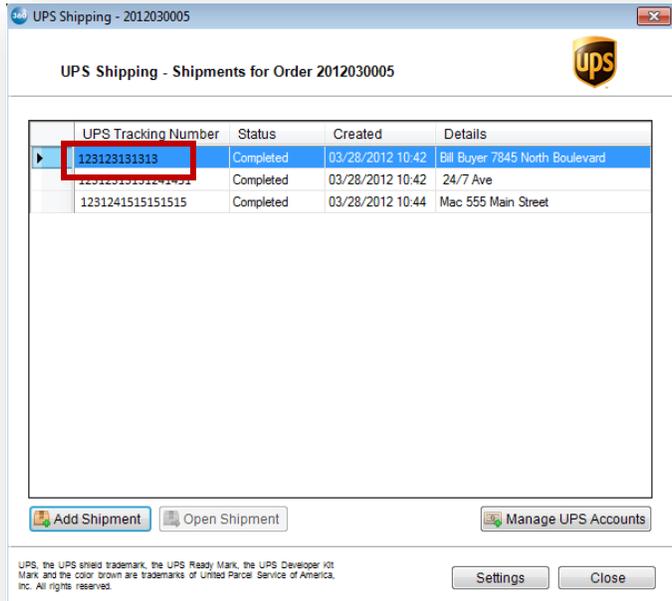
Click the **Tracking Number** to link to the UPS tracking website.

The **Status** shows,

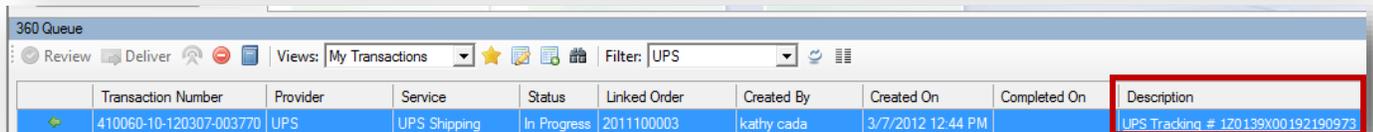
- **In Progress** before the package is delivered

The **Open Shipment** button is enabled when the **Status** is **In Progress** and can be used to view the **Shipment Details** screen.

- **Completed** once the package is delivered



Your SoftPro **360 Queue** will update with a Transaction for the shipment. The UPS tracking number will be available as a hyperlink in the **Description** column. The link takes you to the UPS tracking website. From here you can view the **Status** as well.



Adding Additional UPS Accounts

When you click the **Managing UPS Accounts** button on the **UPS Shipping** screen you can,

- Add additional UPS accounts
- View current UPS account
- Renew the UPS registration - The UPS registration is required if the UPS product has not been used for a period of 7 months or if the error, *Invalid Access License for the tool please re-license*, is displayed.

To add an additional UPS account,

1. Enter the **UPS Account Number**, **Account Name** and **Postal Code**
2. Select,
 - **My Organization** if the account should be available to all users
 - **Just for me** if the UPS account should only be available to you
3. Click the **Add UPS Account** button

Once added, you are returned to the **Current UPS Accounts** screen.

This screen displays all UPS Accounts created under the company's serial number.

To remove an account so that it is no longer available to any user, click the **Remove** link.

Number	Name	Pickup Zip	Type	
123456789	Kathy	27609	Shared	Remove
123456798	test	27609	User	Remove